

14 JAN 1975

MEMORANDUM FOR: Director of Personnel

SUBJECT : Personnel Career Sub-Group Clerical Panel

REFERENCE : OPM 20-3-20, dated 9 September 1974

1. On 22 October 1974, you directed the Personnel Career Sub-Group Clerical Panel to submit a proposal to you, by 15 January 1975, outlining recommended procedures to be used in carrying out the responsibilities set forth in Reference. Therefore, the following recommendations are in response to that directive:

a. Paragraph 2.a. of Reference: The Panel recommends that the OP/Career Management Officer coordinate and arrange periodic orientation sessions for groups of 25-30 clerical employees with less than one year in the MP Career Sub-Group. These sessions will be designed to acquaint attendees with the assigned responsibilities, functions, and policies of the Office of Personnel. Following is the proposed format for these sessions:

(1) Openings by the Career Management Officer outlining the mission and functions of the Office of Personnel as stated in

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[REDACTED] The three Deputy Directors will then relate their respective Divisions/Staffs to their appropriate responsibilities and functions. (Approximately 60 minutes)

(2) Briefing by the Personnel Officer responsible for Office of Personnel financial, logistical, and related matters. (Approximately 15 minutes)

(3) Briefing by the Clerical Panel Executive Secretary on OP training policy for clerical employees. (Approximately 15 minutes)

(4) Briefing and discussion of Panel functions by Members of the Clerical Panel. (Approximately 45 minutes)

b. Paragraph 2.b. of Reference: The Panel recommends that they conduct a semi-annual evaluation and ranking of all members of the Personnel Career Sub-Group, GS-03 through GS-06, and certain employees GS-07 and above. The method of ranking and elements of the evaluation process are contained in Attachment B.

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c.. Paragraph 2.c. & g. of Reference: The Panel recommends that the promotion procedures now in use by the OP Career Management Office be retained with the following modifications:

(1) A minimum number of ranking points will be established by the Clerical Panel for each grade level which will determine the zone of consideration from which to approve promotions. These minimums will be based on a comparison of the score of all members of the Personnel Career Sub-Group in a given grade. The Career Management Office will approve clerical promotions using the appropriate ranking list along with other criteria such as position grade, CSGA, and time in grade.

(2) The Panel recommends that the existing minimum time-in-grade guidelines be modified to prevent clerical employees from achieving their "peak" grade too quickly. By extending minimum time-in-grade guidelines in certain grade levels, the Panel hopes to ensure that an employee's promotion progress will be more evenly paced so that the abrupt decline of promotions available at the GS-06, GS-07, and GS-08 levels does not adversely affect employee morale. Specifically, the Panel recommends the following minimum time-in-grade guidelines:

<u>GRADE</u>	<u>EXISTING</u>	<u>PROPOSED</u>
GS-03 to GS-04	6 months	No Change
GS-04 to GS-05	9 months	12 months
GS-05 to GS-06	12 months	No Change
GS-06 to GS-07	12 months	18 months
GS-07 to GS-08	12 months	18 months
GS-08 to GS-09	12 months	18 months

(3) For exceptionally deserving employees, proposed time in grade may be waived by the Director of Personnel. Consideration could also be given to awarding Quality Step Increases and other special forms of recognition in appropriate cases where promotion is not feasible.

(4) The Clerical Panel will not recommend promotions; however, in cases where a deserving employee is not recognized, the Panel will suggest to the supervisor that the employee be considered for promotion or other recognition.

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d. Paragraph 2.d., g. & h. of Reference: The Clerical Panel recommends that assignments into and out of the MP Career Sub-Group or reassignments within the Office of Personnel be reviewed on an individual basis by the Career Management Office. The requirements of the position to be filled (taken from the LOI and the position description) and the employee record will be taken into consideration. The Career Management Office will approve such assignments subject to agreement by the supervisors concerned. While involved in the evaluation process, the Clerical Panel will determine those individuals who merit consideration for assignment to semi-professional positions. The names of these employees will be brought to the attention of the Career Management Officer who will relay the recommendation to the Personnel Career Sub-Group Panel, Section I, for consideration when appropriate vacancies occur.

e. Paragraph 2.e. of Reference: The Clerical Panel recommends that each Panel member be assigned a group of approximately 25 employees for periodic counseling. In assigning counselors, consideration will be given to work areas and/or organizations. The Panel will assign each member employees of specific components so that he/she can become familiar with the office functions. Each member will be responsible for ensuring that his/her counselees are interviewed four months after EOD and annually thereafter. Each employee will also be afforded the opportunity for counseling at any time. Both the employee and the counselor will have the option of requesting that the employee be assigned to another Panel member for counseling. Each member shall contact appropriate supervisors for input either before, during, or after the interview at his/her discretion.

All interviews will be structured and required to cover the following points:

- (1) Present assignment
- (2) Requested assignment
- (3) Career goals
- (4) Career potential (e.g., employee ranking, if requested)
- (5) Self-improvement
- (6) General discussion (morale, suggestions, requests, etc.)

Memos for the record, signed by the counselor, shall be prepared after each interview outlining the main points of the discussion and recommendations by the counselor.

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f. Paragraph 2.f. of Reference: The Clerical Panel recommends that all clerical employees be given the opportunity to participate in appropriate training using the following procedures and policy:

(1) Office of Personnel Training:

(a) The Panel recommends scheduling approximately four clerical "Skills Sessions" per year relating to OP functions and other topics of special interest.

(b) These sessions will be developed by the Panel and coordinated with the Plans Staff. Appropriate OP supervisors will have an input as to the contents of the sessions.

(c) Attendance at these sessions will be recorded in the employee's soft file.

(2) Other Agency Training:

The Panel recommends that each clerical employee be afforded the opportunity to take the following Agency courses: Administrative Procedures, Administration Directorate Review - Trends & Highlights, CIA Today & Tomorrow, Effective Writing, Fundamentals of Supervision and Management, Employee Development Course for Office Workers, and EDP Orientation.

(3) External Training:

External training will be administered on an individual basis using already established procedures as set forth in OPN No. 20-73-8, dated 27 September 1973.

2. The Panel will review its responsibility and functions on an annual basis for possible revision or modification.

[Redacted Signature Box]

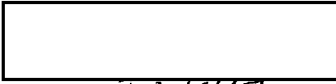
Chairperson,
Personnel Career Sub-Group Clerical Panel

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MR. JANNEY

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The memo from the Chairperson, Personnel Career Sub-Group Clerical Panel indicates that the Panel has endeavored to cover the responsibilities of the Panel as outlined in OPM 20-3-20.

I see no problem in the establishment of periodic orientation sessions. These sessions would be similar to the one that was conducted a few weeks ago in GA-B.

A semi-annual evaluation, as proposed, is in line with the system used by the Board and Panel.

I have no objection to the procedure for promotions and reassignments. It should be pointed out, however, that if a promotion recommendation is received on an individual who is ranked below the zone of consideration, the promotion recommendation should be disapproved.

The Panel is endeavoring to increase minimum time-in-grade requirements in order to prevent the rapid promotion of clericals. I appreciate the concern but I would guess that supervisors would not be happy with longer waiting periods for promoting their good clericals. I would suggest that if a change is necessary, the following : 3 to 4, 6 months; 4 to 5, 9 months; 5 to 6, 12 months; 6 to 7, 12 months; 7 to 8, 18 months; 8 to 9 , 18 months.

In reference to paragraph 1.e., I can see the Panel's desire to conduct periodic counseling. However, I do not believe that an employee should be assigned to a specific Panel member for counseling. The employee should be free to seek out any of the counselors for discussion.

I guess my major complaint is not what the Panel plans to do but the criteria, which I believe is the most important item in the evaluation of our careerists. The criteria seems to be a very minor modification of the criteria now used for the Personnel Assistants and the Personnel Officers in the MP Career Sub-Group. I believe that the criteria should be developed more in line with clerical assignments and work (e.g., judgment, refers to validity of decisions, oral and written expression, supervision). I'm not convinced that the definition and terminology are described appropriately for clerical positions. Some items I would rather see in relation to clericals are ability to work under pressure; effectiveness in answering inquiries; preparation and maintenance of records, files, reports, etc.; knowledge of procedures and techniques used in work; ability to follow involved instructions and guides; ability to get along with co-workers and others; organization of work; accuracy in work; meeting deadlines; knowing when to seek advice, guidance, and assistance; knowledge of organizations and people; production; quality, etc. I must admit I do not see the proposed criteria being used to evaluate clerical employees, for example, under supervision the clerical would be evaluated on "the degree to which the individual is able to motivate and/or supervise people."

I would suggest that another effort be made by the Panel to develop the criteria in such a way that it will be more appropriate for the evaluation of clerical careerists.



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[redacted] Mr. Janney:

Attached is a paper concerning the Clerical Panel. I know it's the times but suggest we consider carefully a mechanism that might set up hopes that may be unfulfilled.

On the positive side, the suggestion that we have periodic orientation sessions is fine. [redacted] and I were doing this many years ago and we believed at that time it had some merit -- they learned something and the "socializing" was useful.

I guess the thing that bothers me most about this paper is the ranking, especially of secretaries. This is a rather subjective matter. OD/Pers has extremely high standards and this may not be so in some other OP components. The ranking criteria appears to have been taken from the professional panels' criteria -- we'd better think about this.

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As regards the counseling, I have more faith in [redacted] [redacted] who have been in this business a long time. A counselor who leads one to expect too much or otherwise raises the false hopes, etc., could do us more harm than good. And, of course, it is difficult for me to think of [redacted] going to one of the counselors when they have someone with more experience, such as either of you.

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